DOCUMENT RESUME

ED 425 745 IR 057 244

TITLE	Council on Library and Information Resources. Annual Report 1997-1998.
INSTITUTION	Council on Library and Information Resources, Washington, DC.
PUB DATE	1998-00-00
NOTE	53p.; For the 1996-1997 annual report, see ED 414 915.
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	Access to Information; Annual Reports; Archives; Change; Electronic Libraries; Foreign Countries; Grants; Leadership; *Libraries; *Library Administration; *Library Cooperation; Library Funding; Library Services; Preservation; Publications; Users (Information)
IDENTIFIERS	Commission on Preservation and Access; *Council on Library Resources; Economics of Information; Financial Reports; Task Force Approach

ABSTRACT

This annual report of the Council on Library and Information Resources (CLIR) contains a list of funders and sponsors, and includes a message from the president. The major CLIR programs are described: (1) Preservation and Access, including international projects in South Africa, Latin America, Asia, and Europe; (2) Digital Libraries, including organizational support for digital libraries, materials selection, discovery and retrieval, intellectual property, digital archiving, and technical infrastructure; (3) Economics of Information, including investment in information study, and the Small-Grants Program; (4) Leadership, including the Digital Leadership Institute, publication of "The Mirage of Continuity," the W.K. Kellogg Foundation Project; and the A.R. Zipf Fellowship Program; and (5) American Council of Learned Societies (ACLS)/CLIR Task Forces, convened to examine the changes that technology is bringing to research and scholarship related to audio materials, visual materials, area studies, manuscripts, and monographs and journals. CLIR publications and advisory groups are listed, as well as CLIR grant and contract recipients, project titles, grant authorization dates, and grant amounts. Audited CLIR financial statements with accompanying notes and a schedule of functional expenses are provided. (DLS)

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ANNUAL REPORT 1997-1998

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Council on Library and Information Resources

The Council on Library and Information Resources (CLIR) grew out of the 1997 merger of the Commission on Preservation and Access (CPA) and the Council on Library Resources (CLR). Over the years, CPA and CLR, in partnership with libraries, archives, and other information providers, advocated collaborative approaches to preserving the nation's intellectual heritage and strengthening the many components of its information system. CLIR was founded to continue this tradition of support for a national information system and a seamless web of information resources, of which all libraries and archives are a part.

The convening role is central to CLIR's mission. CLIR brings together experts from around the country and around the world and asks them to turn their intelligence to the problems that libraries, archives, and information organizations face as they integrate digital resources and services into their well-established print-based environments.

CLIR urges individuals to look beyond the immediate challenges and imagine the most desirable outcomes for the users of library and archives—to be rigorously practical and to dream.

Council on Library and Information Resources

Annual Report 1997-1998

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ACKNOWLEDGMENTS

The following provide crucial support for the activities and programs of the Council on Library and Information Resources:

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The Gladys Krieble Delmas Foundation
The William and Flora Hewlett Foundation
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Abby Smith
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Message from the President

The Council on Library and Information Resources (CLIR) marked its first anniversary as a merged organization on May 30, 1998. While it is premature to boast of stability, the legal and procedural details of the merger have been largely addressed, allowing us to concentrate this year on strengthening and developing programs.

"The CLIR Board concluded that our focus should be on a close examination of the 'big picture' issues that will determine the quality and effectiveness of higher education in the future."

Technology, the expectations and demands of users, and dislocations in the higher education community all contribute to the rapid, fundamental changes occurring in the information agencies and divisions on college and university campuses. In surveying the work that needs to be done, the CLIR Board concluded that our focus should be on a close examination of the "big picture" issues that will determine the quality and effectiveness of higher education in the future. Noting with appreciation the excellent work being done by our colleague institutions, the Board advised that we avoid wasting resources by duplicating those efforts. Instead, we have surveyed the landscape from the perspective of a high-level decision maker and asked, "What does the academic officer, government official, or trustee need to know to make effective, socially beneficial investments in the infrastructure and the organizations that will serve the information needs of the community—be it a campus, a state, or a municipality?"

The Board's second conclusion was that focus is essential. In a world with so many problems to be solved, what can a small not-for-profit organization with no endowment accomplish? We can expect to remain a vital force in the library and information community only if we make our plans and aspirations specific and if we make a persuasive case for them to funding organizations. To sharpen CLIR's focus, the program staff and the Board worked intensely on program definition and direction. Through a combination of regular Board meetings and staff retreats, we examined the

possible activities and reached decisions about the most productive strategies.

The beauty of a flexible, independent organization is that it has the opportunity to dream. In this highly volatile period for library and information organizations, we are compelled to dream of information services as they should be for the new millennium. Unlike membership organizations that must respond to the immediate needs of those who pay the bills, we are not limited to an agenda that addresses urgent organizational problems, although we try to be practical. We are also not limited by an agenda that is politically fashionable. With this luxury of freedom and independence, we are obliged to think creatively and expansively, to draw together the best minds from many different communities to find common ground, and to inspire those who cannot abandon their daily, pressing responsibilities to design the future.

"In this highly volatile period for library and information organizations, we are compelled to dream of information services as they should be for the new millennium."

The ability to bring dreams to fruition is limited, of course, by the dollars that are available. Our dreams cannot be realized unless we deliver reports, publications, and projects that respond to the needs of the communities we aim to serve. Recognizing that funding for nonprofit organizations such as ours has become a much different kind of challenge, the Board and staff have turned their attention to developing new strategies for securing the financial base to advance our chosen programs.

Similarly, we have restructured Board meetings to allow more time for discussions about the future. The lively, probing conversations among the talented and farsighted individuals who volunteer their time to CLIR have been critically important in guiding the programs developed by the staff. We hope to find ways to make the essence of the discussions more accessible to a general audience in the future.

Programs in Review

The bulk of this report consists of the program officers' narratives of accomplishments of the past year. Here, I want to highlight future activities. The activities planned generally respond to the issues we have identified as being of greatest concern to decision makers: economics of information, responsible management of intellectual property, preservation of and access to knowledge, and assuring leadership of information organizations in the next generation. As an overarching concern, decision makers want to understand how digital libraries will make new demands on our institutions.

In response to the interest in the economics of information, we are designing an Investment in Information Project. Still in its developmental stage, the project is being formed by an economist and a provost who are jointly creating a prospectus. We believe that, increasingly, information resources are acquired or leased by many university departments and divisions, not by the library. In earlier days, the library was responsible for securing and managing the information assets of the institution. Equitable access to that information by all members of the campus community was the goal. Today, campus networking, the Internet, and more decentralized budgeting have changed the way universities manage their information resources. Our plan is to develop a tool that universities of different sizes and budgeting systems can use to analyze their own investments in information resources and to make more effective decisions about future investments.

During the past year, the American Council of Learned Societies (ACLS) and CLIR convened meetings of five task forces to consider the effects of digital technology on the creation and distribution of scholarly resources. The substance of the task forces' deliberations is reported in the program narrative, but the discussions that were held over six months will have far-reaching consequences for CLIR. The gap between the services librarians want to offer—and are technologically feasible—and the benefits perceived by scholars, particularly by humanists, is simply too great. Although librarians argue, justifiably, that it is too early to calculate the costs and benefits of digital technology and its derivative products, it is not too soon to engage scholars in discussions of how to engineer change in the scholarly enterprise that will serve current scholars and the generations to follow.

Preservation and Access, the program that was, until recently, an organization itself, will be reconsidered in the coming year. Confusion abounds about what constitutes preservation in the digital environment. Despite pressure from all quarters to specify the requirements for digital preservation, we believe that digital surrogates can be justified only as a way of extending access. The 1996 report, *Preservation of Digital Information*, by Don Waters and John Garrett, eloquently described the analysis and experimentation that must proceed before we can discuss digital preservation confidently. Following the report's recommendations, CLIR has commissioned Jeff Rothenberg to write a research paper on emulation techniques and has commissioned a risk-assessment study of migration strategies from Cornell University. But much more work is needed in this area before we can assure those who follow us that we have been diligent stewards of this generation's scholarly output in its dazzling variety of formats.

Preservation and access will remain the focus of our international initiatives. This year we began work in South Africa. Training in preservation management remains an urgent need in many parts of the world, and CLIR's international activities will continue to place a strong emphasis on building preservation awareness. Increasingly, our international preservation and access agenda will also support activities that link scholars around the world to the resources they use.

Leadership in the digital age also commands much of our attention. Encouraged by the CLIR Board to proceed, we continue to refine the curriculum for the Digital Leadership Institute, even as we seek funding. A recently published collection of essays, *The Mirage of Continuity*, edited by Brian L. Hawkins and Patricia Battin, provides an expansive range of views on what will be required for successful management of academic resources. We expect the book to spark discussions among academic officers, library directors, information technology directors, and scholars. We hope that the monograph will stimulate change in the way information resources are managed on many campuses.

In all of these program activities, our aim is to think about the library and information services as they might be configured in the next three to five years. We want to put programs into effect that will analyze the current situation and assemble the facts in a way that aids decision makers. Two new publications—*CLIR Issues*, which takes an issues-analysis stance, and *Preservation and Access International Newsletter*, which reports on preservation developments worldwide—were launched this past year. Our goal is to provide policy-level analysis that decision makers will find helpful as they attempt to make changes in their institutions. As always, we ask that you contact us with ideas for projects, with feedback on our current work, or with information about activities of your organizations that relate to our programs.

Board Transitions

On October 31, 1997, the CLIR Board bade farewell to those members who completed their terms of office. With fondness and gratitude, we honored Dr. William N. Hubbard, Jr., Dr. Harvey Brooks, Dr. Samuel Cook and Mr. Herman Liebaers from the former Council on Library Resources Board. All four had served on the CLR Board for many years, and their historical perspective, along with their high academic standards and innate good sense, will be sorely missed. From the former Commission on Preservation and Access Board, Dr. Carole Huxley completed her term and Dr. Cornelius Pings resigned. Dr. Huxley had been a CPA Board member from its creation, and her abiding commitment to preservation and knowledge

of political strategies served the Commission, and later, CLIR, exceptionally well. Dr. Pings, who ably represented the Association of American Universities (AAU), retired as its president.

In the spring of 1998, CLIR welcomed three new appointed members, and on July 1, 1998, greeted Dr. Nils Hasselmo, the new president of AAU, who will serve on the CLIR Board by virtue of his appointment. The appointed members—Dr. Robert Bovenschulte, Dr. Charles Phelps, and Ms. Virginia Betancourt Valverde—bring important new perspectives to the Board.

Virginia Betancourt is the national librarian of Venezuela, a post she has held since 1977, and the executive secretary of the Association of Iberoamerican National Libraries. Trained in sociology at the University of Chicago, Ms. Betancourt has written widely on international cooperation and development and preservation. Charles Phelps is provost of the University of Rochester, and his academic background is business economics, specifically, the economics of health care. Through the committee work of the Association of American Universities, Dr. Phelps has taken keen interest in reshaping the system of scholarly communication. Dr. Robert Bovenschulte, director of the Publications Division of the American Chemical Society, has been engaged in scholarly, professional, trade, college, and school publishing over the course of his career. He is working closely with the Association of Research Libraries on the Scholarly Publishing and Academic Resources Coalition (SPARC) initiative. The experience and professional connections of each of these individuals will enhance the CLIR Board's capacity in the scholarly communication and international arenas.

Staff Changes

As program directions were clarified, staff responsibilities were defined and we added two important program positions. On September 15, 1998, Dr. Abby Smith joined CLIR as the Preservation and Access Program Officer. A Russian history scholar with nearly a decade of collections-related experience at the Library of Congress, she is bringing a sharper collections-in-all-formats focus to CLIR's preservation and access program. Dr. Donald Waters joined the staff as the director of the Digital Library Federation on October 6, 1997. His strong academic and systems experience, gained through his 15-year tenure at Yale University, makes him an ideal person to head the Federation. Thanks to his leadership of the first eight months, the Digital Library Federation has a program plan and a governance structure in place, and a host of multi-institutional digital library projects are underway.

Pamela Davis Northcutt, executive assistant, who joined the staff of the Commission on Preservation and Access in its first year of operation, moved away from the metropolitan area on June 26, 1998. Her departure leaves a great organizational and personal void. Alex Mathews, administrative associate, resigned on June 30, 1998.

Although I have overall responsibility for the organization, CLIR's success is realized through the efforts of the highly talented and committed staff who relentlessly pursue the program agendas that have been set in collaboration with the Board. We are richly blessed by the wisdom and creativity of the Board. The day-to-day hard work of the staff gives life and form to the programs that will make a lasting contribution to all of the communities that care about the creation of and continuing access to knowledge. The Board and staff have my greatest admiration—and profound gratitude.

Deanna B. Marcum
President

September 30, 1998

THE PROGRAMS

Preservation and Access

"This year, CLIR's Preservation and Access program has focused on bringing together the communities of experts, scholars, managers, and funders who make decisions that affect collection development and custody."

The goal of library and archival preservation activities is to ensure long-term access to information that is of enduring value. The responsibility for preservation goes far beyond the staff of a preservation and conservation department, and far beyond the walls of the traditional library. Collaborative relationships between preservation experts, computer programmers and scientists, institutional managers, and private and public funders are critical for the persistence of information and the transmission of knowledge over time. This year, CLIR's Preservation and Access program has focused on bringing together the communities of experts, scholars, managers, and funders who make decisions that affect collection development and custody. One element central to effective collaboration is communication. We have concentrated many of our activities on ameliorating a core problem: these communities, with their specialized expertise and vocabularies, do not always understand each other's problems and approaches to solving those problems.

CLIR has put much of its efforts into articulating to a broad audience what the challenges of preservation in the digital world are and who needs to address them. It has made serious efforts to communicate these problems and possible solutions to everyone with whom libraries should be working. In partnership with the American Council of Learned Societies (ACLS), and with generous funding from the National Endowment for the Humanities (NEH), the Alfred P. Sloan Foundation, and the Xerox Foundation, CLIR produced a one-hour documentary film, *Into the Future*, which was released in January for broadcast on public television stations. The film is available in hour and half-hour versions, in formats suitable for domestic and foreign audiences. To accompany the film, CLIR developed promotional and educational materials and dedicated part of its Web site to additional information about digital preservation. CLIR staff members met with leaders in the legislative and executive branches of the federal government, and with members of the computer science community, to address their concerns about policy and research and development implications of the film's message. Through a public relations campaign, CLIR got this message communicated nationally in *The New York Times*, *The Washington Post*, *The Los Angeles Times*, *Business Week*, *U.S. News & World Report*, and several wire services. Deanna Marcum wrote op-ed pieces that appeared in both *The New York Times* and *The Washington Post*.

The exponential explosion of information in digital form has been a central issue to libraries for several years and will be so for a long time. CLIR will continue to advance collaborative programs that help libraries manage the broad implications of digital technology. The Preservation and Access program is especially focused on issues surrounding the scanning and conversion of analog materials to digital. Often, this process is lumped together with other reformatting techniques, such as microfilm-

ing, into the catchall category of "preservation." Scanning is not now a preservation technology, but it is effective as a tool of access. CLIR issued two reports this year, one by Stephen Ostrow, former chief of the Library of Congress's prints and photographs division, on digitizing historical collections, and another by Dan Hazen, Jeffrey Horrell, and Jan Merrill-Oldham of Harvard University on a methodology of selecting research materials for digital conversion. Both addressed the general issue of selection for digitization and the nature of the digital surrogate and its use in research and teaching institutions. CLIR sponsored the Web publication *RLG DigiNews*, edited by a team of experts at Cornell University, which brings together current information in the fast-changing world of digital library technologies. CLIR's support allows the publication to appear bimonthly instead of quarterly.

A critical issue in digital persistence is ensuring the integrity of information over time and through the cycles of software development and obsolescence. CLIR commissioned Jeff Rothenberg, computer scientist at the RAND Corporation, to survey existing models of digital archiving. He found that the only model in use today is that of migration. CLIR has developed a project with Cornell University on the risk factors of migration associated with various types of file formats. It also commissioned Rothenberg to investigate the feasibility and costs of another model of archiving—emulation—in which programs are developed to mimic obsolete hardware and software configurations so that information stored in old formats can still be read.

An unintended consequence of the growth of digital technology applications in libraries has been the tendency to overlook problems in the care of our print and media collections. Consulting with the Preservation Managers Council, CLIR engaged in outreach efforts to keep the needs of hybrid collections at the center of libraries' agendas. Through speeches, representation at professional meetings, and publications including *CLIR Issues*, CLIR continues to advocate for cost-effective preservation of print and nonprint sources in their original formats. Informed by the work of the CLIR/ACLS task forces and by the advice of the Preservation Managers Council, CLIR found that the ultimate challenge for any library is to continue to develop and sustain the historical collections in a broad mix of media that form the backbone of great research libraries. The Preservation Managers Council, first convened as a standing committee of the Commission on Preservation and Access in 1992, recommended that CLIR disband the group and develop ad hoc advisory teams that will incorporate a greater range of library functions and expertise.

CLIR testified before a congressional appropriations committee in support of the National Endowment for the Humanities' Brittle Books program. It

provided financial, organizational, and publishing support to a group funded by NEH to support preservation nationwide. The Regional Alliance for Preservation (RAP), made up of five regional preservation groups (the Northeast Documentation Conservation Center, the Conservation Center for Art and Historic Artifacts, the Southeastern Library Network, AMIGOS Bibliographic Council, and the Upper Midwest Conservation Association) continued work on its project to develop new models of communication and cooperation to serve its users more effectively. In the course of the one-year Shared Preservation Training Resources Demonstration Project, they published three newsletters and developed a Web site. Both activities have been moved to sites within RAP and show how beneficial such sustained collaboration can be in meeting the needs of the centers.

Looking ahead, digital technology will continue to change the way we think about preservation and access because of the ease of creating faithful copies from digital surrogates. We are beginning to understand that digital reformatting costs a great deal, although we cannot pinpoint the exact costs. Conversion projects, no matter how carefully circumscribed and focused, place great burdens on an institution to maintain electronic files through costly migration strategies. The challenge will be the closer integration of preservation planning with decisions about what to acquire and what format to use, and how to maximize access without compromising preservation.

International Projects

International program officers work abroad to raise awareness about preservation and to help identify methods and strategies for dealing with problems of access in libraries and archives. Often, CLIR provides modest financial resources to allow institutions to take the next steps in a preservation strategy. Although conditions differ among countries, needs are always great. It is not easy for custodians of historical materials to know where to begin, especially when information and funds are scarce. CLIR encourages and supports activities where the need, receptivity, and opportunity to work with regional institutions exists.

Although the projects have focused on institution building abroad, staff members also are engaged with several CLIR initiatives to strengthen international connections between scholars and the resources they use. For example, international program officers represented the Digital Library Federation at a European meeting on the Preservation of Digital Information. They also continue to promote development of new nodes for an international register of microform masters. The register helps scholars

locate available surrogates and allows institutions to spend their resources most efficiently by knowing what others have already preserved.

CLIR maintains a broad network of institutions and individuals throughout the world, even in countries where the program does not support specific projects. Members of this network depend on CLIR for advice, contacts, information, location of resources, and more. An active exchange of information also gives CLIR an overview of a growing preservation movement worldwide, allowing staff to link activities in one country to related activities in another. In March, CLIR launched a new quarterly publication, *Preservation and Access International Newsletter*, which reports on preservation initiatives worldwide.

South Africa

A highlight of the year was the initiation of a new program in South Africa. In September, program officers Hans Rütimann and Kathlin Smith visited South African institutions to learn about preservation efforts there. Training in conservation and preservation management is an urgent need: There is little capacity for conservation training and professionals must seek training abroad at great expense. Professionals need not only to improve conservation skills, but also learn how to manage the preservation of large collections of endangered materials. CLIR will sponsor short courses aimed at the basic and immediate needs of participants.

In March, 20 South African library and archives staff members attended a week-long preservation workshop in Durban supported by CLIR funds. The program examined why and how paper-based records deteriorate, and it presented options for reformatting print, audio, visual, and digital materials. The workshop served as a model for a second one, in April, directed at all of Anglophone Africa, for which CLIR provided training materials.

CLIR will continue to support training activities in the coming year and will support a meeting of librarians and archivists from the Cape Town area to discuss regional preservation needs.

Latin America

Latin America remains central to CLIR's international preservation and access agenda. Two projects with the National Library of Venezuela were completed. The first was the library's contribution of more than 22,000 records of Latin American holdings in microform to the European Register of Microform Masters (EROMM). The records represent microfilm holdings from several libraries in Venezuela, and from the National Libraries

of Chile, Peru, Colombia, Costa Rica, and Brazil, and the Biblioteca Hispánica in Spain and the Universidad Interamericana Simón Bolivar in Panama. This contribution will help EROMM build a resource for scholars and preservation managers to find out if specific titles have been reformatted and how to obtain copies. The records eventually will be made available through the Research Libraries Information Network (RLIN) as part of the RLG-EROMM record-sharing agreement.

The second project translated selected preservation literature into Spanish. The Spanish translation project was similar to an effort in Brazil in 1995-97, which led to the publication of 52 titles in Portuguese. This year, CLIR helped coordinators of the Brazil project to plan for a continuation and expansion of its translation, workshop, and data collection project.

In a separate effort, CLIR concluded agreements with six countries for the distribution of the Portuguese translations in Lusophone Africa and Macao. The titles cover topics ranging from disaster preparedness to the long-term archiving of digital information. As in Brazil, the literature and other materials may form the basis for preservation workshops.

Asia

In December, Fudan University in Shanghai completed microfilming more than 4,000 titles of monographs published between 1932 and 1945 that were at risk because they had been published on especially poor paper. The CLIR-sponsored project, which was supported by the National Endowment for the Humanities and The Henry Luce Foundation, brings a significant new body of work in literature, history, philosophy, law, economics, popular culture and society within easy reach of U.S. scholars. The microfilms will be available for loan or purchase from the Center for Research Libraries by the end of this year.

Judith Henchy issued a report entitled *Preservation and Archives in Vietnam* that provides an overview of the largely unexplored corpus of Vietnamese textual resources in research institutions and an examination of the state of their bibliographic control and preservation.

Europe

In June, the National Library of Poland finished creating the infrastructure for the collection of bibliographic information about microform masters held by the National Library and other libraries in Poland. Under contract with CLIR, the library created several thousand bibliographic records and shared them with EROMM. That information already is available on RLIN, and the National Library's staff can now offer advice to other

Eastern European institutions on how to establish similar nodes for collecting information about microfilm masters.

CLIR continued its affiliation with the European Commission on Preservation and Access (ECPA) to copublish and distribute reports. CLIR published *Digitization as a Means of Preservation?*, a report originally published by the Deutsche Forschungsgemeinschaft (German Research Association) and translated into English for the European publication by the ECPA.

International program officers held discussions with colleagues in Greece and Italy about extending their work into southern Europe in the coming year.

Visit of Representatives from St. Catherine's Monastery

With a special grant from The Andrew W. Mellon Foundation, CLIR organized a five-week visit to the United States by Father Justin from St. Catherine's Monastery in Sinai, Egypt, and photographer Anastasios Christodoulides. Both have been working to catalog and conserve the monastery's collections of icons and manuscripts. When the work is completed, the monastery will have digitized about 4,500 complete manuscripts and 40,000 fragments of its rich collection and can share these resources with scholars without exposing the fragile originals to use. The two attended the Cornell Digital Training Workshop and visited the Digital Scriptorium Project at the University of California, Berkeley and Columbia University.

DIGITAL LIBRARIES

CLIR serves as the administrative home for the Digital Library Federation (DLF). Begun by 15 research libraries and archives in 1995, the Federation seeks to establish the necessary conditions for creating, maintaining, expanding, and preserving a distributed collection of digital materials for both scholars and the general public. Federation partners share the investment in developing the infrastructure that will enable them to bring together, or federate, the works they manage for their users.

The DLF has grown to 22 libraries and other organizations participating as full partners and three institutions formally allied to the Federation. The DLF has also forged working relationships with many institutions both in the United States and abroad that have related interests in digital libraries. Directors of the partner and allied institutions serve on the DLF Steering Committee which, with members of a Technical Architecture Committee and staff of the partner and allied institutions, work closely with the DLF Director in formulating and executing a rich agenda of projects, research, and other tasks designed to help the development of digital libraries.

"The Federation's program plans call for action in four areas: developing libraries of materials born digitally, integrating digital materials into the fabric of academic life, building core infrastructure for digital libraries, and supporting the organization of digital libraries."

The Federation's program plans call for action in four areas: developing libraries of materials born digitally, integrating digital materials into the fabric of academic life, building core infrastructure for digital libraries, and supporting the organization of digital libraries. The activities described below reflect the work undertaken in these areas.

Projects

Several projects have given the DLF partners a chance to contribute to the growing store of digital materials, to develop mature organizational structures, and to enhance specific aspects of digital library infrastructure and operational services. These include:

The Making of America, Part II. Led by the University of California at Berkeley and including Cornell, New York Public Library, Pennsylvania State, and Stanford, this project focuses on special collections related to the theme of transportation in the Gilded Age. A report produced in the initial phase of the project describes standard means of creating electronic links between encoded finding aid descriptions of the collections and digitized versions of collection objects. The National Endowment for the Humanities has funded the implementation phase of this project.

The Making of America, Part III. Planning began for this project, which will provide ways of integrating collections of Americana already digitized at the DLF institutions so that readers can more easily discover and retrieve

them. It will also develop and demonstrate migration techniques for preserving digital information.

Social Sciences Databases Project. Reflecting the emphasis of the DLF on materials born digitally, participants in this project will identify databases that are in high demand for the undergraduate curriculum but are difficult to use and costly to support. Work will be divided among several institutions to make these databases and their codebooks available in a uniform, user-friendly, broadly accessible way.

Organizational Support for Digital Libraries

Scope of work. For the DLF partners effectively to "federate" digital libraries, they must share a common understanding of what a digital library is. The definition of digital libraries they created identifies the Federation's general scope of work:

"Digital libraries are organizations that provide the resources, including the specialized staff, to select, structure, offer intellectual access to, interpret, distribute, preserve the integrity of, and ensure the persistence over time of collections of digital works so that they are readily and economically available for use by a defined community or set of communities."

Support structures. The Federation supports and fosters the development of digital libraries as organizations in part by helping digital library directors identify key policy and operational issues. The directors have begun to address the shared and conflicting values associated with the distribution of intellectual property that digital libraries own and manage. Other policy questions that need attention include how closely to position digital libraries in relationship to the researcher's and scholar's desk or lab bench, and how to finance digital libraries in a larger information environment. The DLF has also planned a series of projects, workshops, and publications that will help digital library managers and staff build technical experience and a sense of professional community for creating and managing digital libraries that are highly responsive to user needs.

Selection

The durability of digital libraries depends on how deeply the materials selected are integrated institutionally into the fabric of research, teaching, and learning. A study of the DLF institutions shows that the criteria for selection must include how well the material advances one or more of the following four institutional goals: Does the material help the institution to organize and manage new forms of knowledge that are available only in digital form? Does it contribute to efforts to manage intellectual property

in ways that enhance scholarly communication? Does it serve programs that aim to improve the quality and lower the cost of research and learning? Does it support institutional efforts to extend research and educational services to the general public, to special categories of constituents such as corporate partners or alumni, or to students in distance education programs?

Discovery and Retrieval

Metadata. Metadata, or information about content, is important in helping readers identify, retrieve, and use digital materials. Accordingly, the DLF distinguishes descriptive, structural, and administrative metadata. Information that describes content helps readers know of an item's existence and characteristics in relation to other information and to particular information needs. The digital environment has allowed new kinds of descriptive information, such as the encoded archival description (EAD) for archival materials, to be developed. It has also allowed the integration and manipulation of descriptive information about materials in digital and other formats.

The difficulties and added costs of managing digital information arise from the uncertainty and lack of standard practice regarding the creation and use of structural and administrative metadata. The Making of America, Part II, is developing practices for information about the internal structure of digital materials that is essential for organizing its delivery in a consistent and coherent way. Administrative metadata is information about a digital resource that facilitates the management of its intellectual property, as well as its long-term preservation. The DLF is advancing understanding of administrative metadata requirements in digital libraries through its work on access management and archiving, as described below.

Distributed finding aids. There are many ways that libraries can present finding aids that are created as encoded archival descriptions. The DLF supported research at Michigan and Harvard Universities to explore the means and costs of searching encoded finding aids that are distributed among different institutions, rather than collected in a single repository.

Workshop on editorial practice. The DLF seeks to enhance the editorial practices of Electronic Text Centers and others engaged in digital conversion as a form of publication. It sponsored a conference of leading text center staff focused on the application of the Text Encoding Initiative (TEI) standards in library-based text encoding projects, the ramifications of XML development on existing and future text encoding programs, and the future governance and stability of the TEI standard.

Intellectual Property

Licensing digital materials. The DLF funded Ann Okerson of Yale University to develop software that will support library and publisher licensing efforts. Tentatively entitled "The LIBLICENSE Guide to Digital Information Licensing Agreements," the software will systematically query librarians (or producers) about the details of the information to be licensed and, based on that input, produce a draft license agreement. The draft license agreement can then be sent to information publishers (or customers) to serve as the basis for further negotiations for license agreements with acceptable terms.

Access management. The DLF is addressing the technical and other problems associated with helping users gain authorized access to networked information. The Federation sponsored a planning meeting for a project that is now underway involving the libraries and information technology divisions of universities belonging to the Committee on Institutional Cooperation (CIC). The project will implement a protocol that enables one institution to accept users of its resources who have been authorized at other institutions. The DLF participated in the development of the CNI White Paper on Authentication and Access Management, which identifies various technical options and sets forth criteria for evaluating their effectiveness. With the support of the National Science Foundation, the DLF and Columbia University's Center for Research on Information Access (CRIA) sponsored a day-long workshop in April to develop formal requirements for more sophisticated and versatile systems authorization than those in common use today. The report of the workshop identifies a set of themes that can guide systems designers and developers of prototype systems for information access.

Digital Archiving

Emulation. CLIR commissioned a report from Jeff Rothenberg, computer scientist at the RAND Corporation, to document and assess existing models of digital archiving and to develop his theories of software emulation. His interim report argues that migration strategies are simply too labor-intensive to be viewed as a reliable preservation treatment, especially in an era of such dynamic change as our own, when standardization, which is critical for migration, is not feasible.

Migration. CLIR has also commissioned a study at Cornell University to explore the degree of preservation risk associated with various formats of materials in digital form. Cornell is developing a risk assessment tool and investigating practical preservation procedures to carry out migration

strategies for materials in the selected formats. The products of this project should help other libraries in managing their digital collections.

Technical Infrastructure

Digital Library Architectures. The DLF has commissioned a survey of recent literature on the systems architecture of digital libraries. The survey will highlight selected component systems and show how they relate to a larger architectural whole. It will assess which components are relatively well conceptualized and developed, which need further attention, and where gaps might exist in the overall conception of digital library architecture. The survey report will serve as the basis for a forthcoming workshop for library systems staff, to be sponsored by the DLF Technical Architecture Committee.

Persistent names. As part of its focus on the infrastructure for discovery and retrieval, the DLF is helping to design a framework for the persistent identification of digital materials. It has formulated a research agenda to create the means of linking a reference to a digital work to the multiple repositories where the work may reside. This is a difficult problem that DLF libraries are now encountering in the distribution and use of digital materials. The DLF is identifying research partners as part of the development of a formal proposal in the NSF-sponsored Digital Library Initiative funding program.

The Economics of Information

The Investment in Information Study

CLIR developed plans for a study to explore both the real costs to universities of providing information resources and the complexity of the choices institutions must make as they use their limited funds. There was a time when the library budget might have been identified with the information budget. But in an age of distributed access to information from multiple wired locations, that no longer is the case.

Academic information purchased or licensed through the library, through departments, and through institutes will be the study's focus, even though institutions also purchase many other categories of information. The intent is to include all information used for research, teaching, and services.

It appears that universities will move toward unifying the management of all information resources on campuses. Though unification will take time to achieve because faculty members and academic units may be reluctant

to cede control, universities meanwhile must gain a thorough understanding of their information budgets. The CLIR study will create models that universities can use to achieve that understanding. Administrators will learn about the new role libraries can play in information management.

An advisory committee of the CLIR Board is helping to shape the project. It devised three aspects of determining a university's investment in information resources:

- *Collection creation costs.* What are the costs of both people and equipment associated with creating knowledge databases either in academic departments or in libraries?

- *Access.* Is access to a category of information open to all members of the academic community, or is it restricted? How should the university deal with information sources to which members of the community gain access individually or through institutions or departments?

- *Permanence.* Is information added to the library as a permanent asset, or is it meant only to serve the temporary needs of specific individuals? Should those individuals be able to take that information when they move to other institutions? And if the information is temporary, should it be counted as information costs to the institution?

Three universities will take part in the study, two private and one public. One of the private institutions will have a centralized budgetary process, and the other a decentralized process. Besides the advisory committee, the project will involve two principal investigators—a provost and an economist interested in the economics of information. An auditing team will study the three universities under the direction of the principal investigators.

Small-Grants Program in the Economics of Information

CLIR ended its program of Small Grants in the Economics of Information, which had been funded by The Andrew W. Mellon Foundation. Twelve proposals were funded, and the program concluded with grants to Northwestern University and to the University of Minnesota.

LEADERSHIP

Digital Leadership Institute

As more information has become available in electronic format, formerly distinct organizational responsibilities on university campuses have overlapped and blurred. At the same time, the instructional and scholarly uses of technology have altered pedagogical and research methodologies. Thus, digital information and communications technologies are shaping new relationships among librarians, their information technology counterparts, and faculty members. But universities are not yet organized and staffed to cope with the consequences of these remarkable changes.

"Library and information-technology directors say universities need to manage their resources more effectively, and they believe the Institute will contribute to the instillation of new methods and practices."

To address these changes, CLIR developed a Digital Leadership Institute to help universities transform the management of their information resources in the new digital era. Library and information-technology directors say universities need to manage their resources more effectively, and they believe the Institute will contribute to the instillation of new methods and practices.

The Institute will provide continuing-education opportunities for individuals who currently hold, or will one day assume, positions that make them responsible for transforming the management of scholarly information in the higher education community. Over the next five years, the Institute will train a cadre of several hundred professionals—most of them in midcareer and drawn from library and administrative staffs, computer centers and faculties. These will be the leaders who can preside over this transformation on the nation's campuses and comprehend its broad implications for educational mission and the allocation of financial resources. Participants in the Institute will progress through a training experience that begins with a two-week seminar on the university campus, continues with a year-long practicum on the home campus (or another setting appropriate to the individual's goals), and concludes with a summary session back at the university. The Institute should produce professionals with a sophisticated understanding of the changes digital technology is bringing to traditional academic management.

The Mirage of Continuity

In partnership with the Association of American Universities, CLIR prepared for publication a volume of essays entitled *The Mirage of Continuity: Managing Academic Information Resources in the 21st Century*. The book has two contributing editors: Brian L. Hawkins, the first president of EDUCAUSE, who served previously as the senior vice president for academic planning and administrative affairs at Brown University; and Patricia Battin, one of the nation's most distinguished librarians, who was

vice president for information services and university librarian at Columbia University and the first president of the Commission on Preservation and Access.

Hawkins and Battin are joined by 15 additional contributors who share their conviction that the traditional conceptions of "library" and "information technology division" no longer serve institutions and may even be debilitating them. They argue that universities must conceive anew how instruction, learning, research, management, and finances are to be conducted in the global digital society. The transformative powers of the technology cannot be confined to libraries. Instead, they invite the fundamental reorganization of entire institutions.

The W.K. Kellogg Foundation Project

As part of the Human Resources in Information Systems Management (HRISM) program, CLIR has helped bring together disparate professional and governmental organizations to consider the social policies and strategies for providing information resources needed by a community. We asked how technology can be harnessed to provide better and greater access to information for all who need it and what policies must be in place to assure that the potential benefits are realized. CLIR continued to work with other HRISM grantees to assemble their reports and other grant products into a forthcoming Web-based curriculum that schools of library and information science and training divisions of libraries can use.

The A.R. Zipf Fellowship Program

CLIR awarded its second A.R. Zipf Fellowship to Maureen Mackenzie, a Ph.D. candidate in the Palmer School of Library and Information Science at Long Island University's C.W. Post campus. Ms. Mackenzie entered Long Island University's doctoral program after 14 years of experience in the insurance industry. Her research interests include the information-seeking behavior of middle- and top-level managers and the effects of information on business.

The A.R. Zipf Fellowship was established in 1997 in honor of Mr. Al Zipf, a pioneer in information management systems and a guiding force in many of the dramatic technological changes that occurred in the banking industry during his forty-year career with the Bank of America.

Each year, CLIR awards the fellowship to the student judged to have the greatest promise in the areas of information management in which Mr. Zipf was involved. The fellowship is endowed by Mr. Zipf's family and professional colleagues.

The ACLS/CLIR Task Forces

With the American Council of Learned Societies, CLIR convened five task forces to examine some of the fundamental changes that technology is bringing to research and scholarship. The task forces were organized around types of material: *area studies materials, audio materials, manuscripts, monographs and journals, and visual materials.* Membership of each task force included scholars, librarians, and university administrators. Each group was asked to answer the following questions:

- How will digital technology affect scholarship and instruction?
- How can we make certain that libraries and archives continue to serve the research needs of scholars and students in the face of the technological transformation?

The *audio materials* task force members agreed that research and scholarship would be advanced by creating finding aids to help locate materials and by providing information about those aids in common databases. In fact, several of the groups said finding aids are fundamentally important. The *visual materials* task force agreed that finding aids should have their origins in descriptions of particular collections, and the technology would be used to gain access to them on local, interinstitutional, and even international scales. But a linked system of distributed finding aids does not yet exist, and additional research is needed. The Digital Library Federation has funded a project at the University of Michigan and Harvard University to do practical research on linking distributed finding aids.

Members of the *area studies* group worried that the introduction of digital technology might consume funds that libraries otherwise would use to acquire foreign print materials. On the other hand, they agreed that the technology might help institutions develop shared collections and to build resources that are essential to the survival of area studies.

Members of the *manuscripts* group were most concerned about preserving primary materials and keeping them accessible. They were enthusiastic about using the technology not to digitize primary materials, but to promote access to them.

The *monographs and journals* group saw an urgent need to use technology in support of scholarship. It advocated new approaches to scholarly publication that are competitive, efficient, and respected. For example, the Association of American Universities is working to separate the process of scholarly certification from the process of scholarly publication. That would allow the work to be peer reviewed, endorsed, and archived

without appearing in print. Transferring research results from print-based to electronic formats will profoundly affect the economics of providing information on campuses.

After continuing the conversation through electronic listservs, the task forces convened in a plenary session to discuss four principal topics:

Finding Aids and Bibliographical Resources

Developing and setting standards for finding aids should be the top priority, but there was no consensus on whether funding should be directed to the conversion of existing finding aids or toward the creation of new ones for unprocessed collections. CLIR should encourage faculty members to build courses and seminars around original materials in all formats, and around collections that need description. Students and faculty members then would have the opportunity to describe materials for which there are no finding aids. CLIR should advocate national acceptance of Encoded Archival Description (EAD) for marking up finding aids.

The Growth and Management of Collections

There should be a national discussion about the custody of culture, the development of library collections, and the formulation of policies that assign responsibility for both unique resources and common resources. Tough, even painful, decisions must be made about which collections libraries will maintain. We must ensure the preservation of unique materials and develop ways to make distinctive collections more widely accessible without building homogenized collections that just mirror one another. Cooperation is essential among libraries in deciding where collections will be stored. To assure cooperation, a new structure should be created to join scholars, librarians, and technical experts in the difficult process of selecting materials and managing collection development.

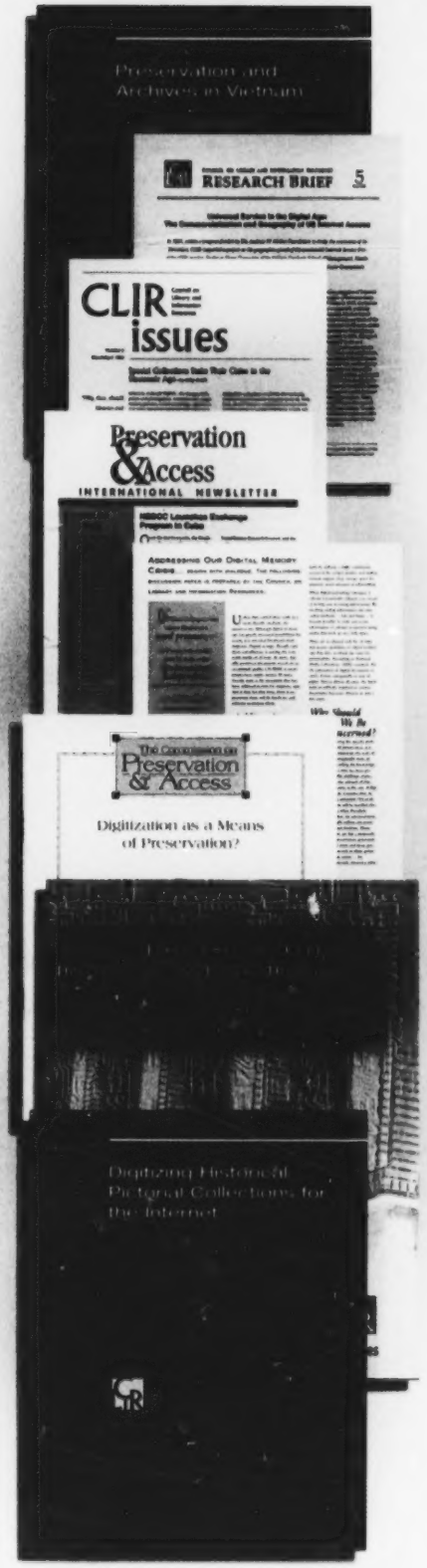
The Components of Infrastructure

Universities need to invest in a comprehensive system of electronic resources and in training scholars to be comfortable with the technology. A new system of scholarly communication needs to be defined and accepted that will allow scholars to reclaim from the commercial sector some important functions of publication. Learned societies should establish a forum to discuss preservation issues for digitized resources, especially how to make decisions about preserving digitized information before it is lost.

Copyright and Intellectual Property Issues

Faculty members should engage in open and in-depth discussions, perhaps under the auspices of scholarly societies, on copyright and intellectual property issues. The discussions should take into account the difference in copyright needs for general collections and for special and museum collections, and how better to manage intellectual property.

CLIR will issue a final report on the conclusions summarized above.


Preservation and Archives in Vietnam
RESEARCH BRIEF 5
CLIR issues
Preservation & Access
INTERNATIONAL NEWSLETTER
Digitization as a Means of Preservation?
Digitizing Historical Pictorial Collections for the Internet

PUBLICATIONS

JULY 1, 1997 - JUNE 30, 1998

Reports:

Coleman, James and Don Willis. *SGML as a Framework for Digital Preservation and Access*. July 1997.

Healy, Leigh Watson. *Library Systems: Current Developments and Future Directions*. May 1998.

Henchy, Judith. *Preservation and Archives in Vietnam*. February 1998.

Ostrow, Stephen E. *Digitizing Historical Pictorial Collections for the Internet*. February 1998.

Weber, Hartmut and Marianne Dörr. *Digitization as a Method of Preservation?* October 1997.

CLIR Annual Report. 1996-1997.

Newsletters and Other Materials:

Commission on Preservation and Access. *Newsletter*: nos. 101-104. July-December 1997.

Commission on Preservation and Access. *Regional Alliance for Preservation (RAP) Newsletter*: September 1997 and January 1998.

CLIR Issues. nos. 1-3. January-June 1998.

Preservation and Access International Newsletter. nos. 1-2. March-June 1998.

Research Briefs. nos. 1-5. November 1997-April 1998.

Brochure and educational materials for the film *Into the Future: On the Preservation of Knowledge in the Electronic Age*. January 1998.

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Consultant

Chandru Shahami
Library of Congress

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Karen Turko
University of Toronto

John Van Bogart
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Christine W. Ward
New York State Archives & Records Administration

REGIONAL ALLIANCE FOR PRESERVATION

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Southeastern Library Network, Inc.

Tom Clareson
AMIGOS Bibliographic Council, Inc.

Steve Dalton
Northeast Document Conservation Center

Sherelyn Ogden
Upper Midwest Conservation Association

Jill Rawnsley
Conservation Center for Art & Historic Artifacts

Glen Ruzicka
Conservation Center for Art & Historic Artifacts

ACLS/CLIR TASK FORCES

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University of Texas at Austin

Charles B. Faulhaber
University of California, Berkeley

Peter T. Johnson
Princeton University

Stanley N. Katz
Princeton University

Edward L. Keenan
Harvard University

Hwa-Wei Lee
Ohio University

Pauline Yu
University of California, Los Angeles

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Doane College

Samuel Brylawski
Library of Congress

Howard Dodson
Schomburg Center for Research in Black Culture

David E. Fenske
Indiana University

Nancy E. Gwinn
Smithsonian Institution Libraries

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Gilbert R. Whitaker, Jr.
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Max Byrd
University of California, Davis

Ellen S. Dunlap
American Antiquarian Society

David J. Garrow
Emory University

David Stam
Syracuse University

Douglas Wilson
Monticello

David S. Zeidberg
The Huntington Library

Monographs and Journals Task Force

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University of Pennsylvania

Kevin M. Guthrie
JSTOR

Neil Harris
University of Chicago

Arthur Herman
George Mason University

Michael A. Keller
Stanford University

David Mindell
Massachusetts Institute of Technology

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Columbia University

William D. Walker
New York Public Library

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College Art Association

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Yale University

Jeffrey L. Horrell
Harvard University

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Harvard University

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New York Public Library

DLF Allies

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National Archives at College Park

James P. Michalko
Research Libraries Group, Inc.

Donald J. Muccino
OCLC, Inc.

GRANTS AND CONTRACTS
ACTIVE IN FY 1998

Recipient	Project	Authorized	Amount
Association of Research Libraries Washington, DC	The Character and Nature of Research Library Investment in Electronic Resources	6/21/96	$11,800
Association of Research Libraries Washington, DC	Latin American Book Price Index	10/29/96	$7,100
Bland, Mark Washington, DC	Professional Development Grant	3/31/98	$5,000
Center for Research Libraries Chicago, Illinois	International Newspaper Symposium	5/7/97	$10,000
Coalition for Networked Information Washington, DC	Conference on Assessing the Academic Networked Environment	6/18/97	$10,000
Conservação Preventiva em Biblioteceas e Arquivos Rio de Janeiro, RJ Brazil	Supplement to "Translation and Dissemination of Preservation Knowledge in Brazil" Project	9/10/97	$19,050
Dr. Elmar Mitler, Germany and Mr. Kurt De Belder, The Netherlands	Travel Expenses for WESS/ARTS Program	9/4/97	$2,900
Friends of the South African Library Cape Town, South Africa	Preservation Training for South African Librarians	1/9/98	$4,000
History Associates, Inc. Rockville, Maryland	Conference on Documenting the Digital Age	5/7/97	$5,700
IFLA Core Programme for Preservation and Conservation (PAC) Paris, France	Joint Publication with IFLA-PAC of "Preservation Principles for Library Materials"	10/31/96	$10,000
Johns Hopkins University Baltimore, Maryland	The Information-Seeking Process Among Population Studies Researchers	8/7/92	$4,000
National Library of Poland Warsaw, Poland	Conversion of the National Library of Poland's Register of Microform Masters to Machine-Readable Form	1/1/94	$120,000
National Library of Venezuela Caracas, Venezuela	Program for Translating Preservation Literature into Spanish	8/9/96	$33,663

Recipient	Project	Authorized	Amount
National Library of Venezuela Caracas, Venezuela	Infrastructure for Automated Processing of Microfilming Holdings in Latin America and the Caribbean	5/6/95	$109,432
New York State Library Albany, New York	New York State Information Locator System Prototype	7/8/94	$24,880
Northeast Document Conservation Center Andover, Massachusetts	Preservation Initiatives in Cuba	5/6/97	$12,900
Pubcomm Group (The Alexandria Project) New York, NY	An Approach to Developing a Cataloging System for the World Wide Web	11/11/97	$2,500
Research Libraries Group, Inc. Mountain View, California	Finding Aids SGML Training (FAST)	11/11/96	$30,000
Research Libraries Group, Inc. Mountain View, California	Sponsorship of Research Library Group's Web-based Newsletter *RLG DigiNews*	11/3/97	$7,700
Rothenberg, Jeff Santa Monica, California	Survey Existing Models of Digital Archiving and Develop an Approach to AssureAccess to Digital Information into the Future	10/8/97	$40,000
Rutgers University New Brunswick, New Jersey	Exploration of Variable Pricing for Online Services at Research Libraries	11/15/96	$24,954
Rutgers University New Brunswick, New Jersey	The Efficiency of Research Libraries: A New Analytical Tool and Pilot Study Using 1995 ARL Data	11/15/96	$24,973
Society of American Archivists Chicago, Illinois	Standards for the Encoding of Archival Description and Finding Aids in SGML	12/7/95	$24,600
Southeastern Library Network, Inc. (SOLINET) Atlanta, Georgia	Leadership Institute for Rural Public Libraries	11/6/96	$24,000
Stanford University Stanford, California	Evaluating the Preservation Needs of Software Collections	4/30/98	$25,000
Stanford University Stanford, California	A User Survey of Online Scientific Journals	2/23/96	$25,000

Recipient	Project	Authorized	Amount
State University of New York, Buffalo Buffalo, New York	Statistical Process Control of Interlibrary Loan for Continuous Quality Improvement	4/25/95	$28,090
University of California, Berkeley Berkeley, California	Performance Measures for Research Library Collections and Information Services: A Planning Project	6/21/96	$25,000
University of California, Berkeley Berkeley, California	Planning Phase of the MOA II Testbed Project	11/19/97	$49,908
University of California, Berkeley Berkeley, California	Partnership for Library Continuing Education Research	11/14/96	$4,000
University of California, Los Angeles Los Angeles, California	The UCLA Senior Fellows for Public Libraries Summit Meeting	2/7/96	$22,000
University of California, Los Angeles Los Angeles, California	Conference on Graduate Archival Education and Research	5/23/96	$3,411
University of Michigan Ann Arbor, Michigan	Pricing Electronic Scholarly Information: A Research Collaboration	11/15/96	$25,000
University of Michigan Ann Arbor, Michigan	Distributed Finding Aid Server, Proposed by Harvard University and the University of Michigan	5/6/98	$25,000
University of Minnesota Minneapolis, Minnesota	A Study of New Organization Models for the Collection Management Function	2/12/96	$4,628
University of Zambia Lusaka, Zambia	Library and Information Science Curricula in Zambia	1/31/97	$4,000
Virginia Commonwealth University Richmond, Virginia	Using the Contingent Valuation Method to Measure Patron Benefits of Reference Desk Service in an Academic Library	11/15/96	$20,000
Yale University Library New Haven, Connecticut	LIBLICENSE Software for Drafting Licensing Agreements for Academic Research Libraries	6/5/97	$23,000
Yale University New Haven, Connecticut	Electronic Licensing Resource for Academic Research Libraries	5/31/96	$20,200
Yale University New Haven, Connecticut	Preservation of Digital Information Through Migration	7/1/96	$25,000

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

FINANCIAL STATEMENTS
WITH
ADDITIONAL INFORMATION

FOR THE YEAR ENDED JUNE 30, 1998
(With Summarized Financial Information for June 30, 1997)

WITH
INDEPENDENT AUDITORS' REPORT

STONE AND SPRING
Certified Public Accountants
Herndon, Virginia

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Council on Library and Information Resources

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STONE AND SPRING
CERTIFIED PUBLIC ACCOUNTANTS

112 Elden Street, Suite G
Herndon, Virginia 20170
(703) 904-9027
(703) 904-9029 Fax

50A South Third Street
Warrenton, Virginia 22186
(540) 347-2030
Fax (540) 347-0452

Michael G. Spring, Jr., C.P.A.
Stephen C. Stone, C.P.A.

INDEPENDENT AUDITORS' REPORT

To the Board of Trustees
Council on Library and Information Resources
Washington, D.C.

We have audited the accompanying statement of financial position of the Council on Library and Information Resources as of June 30, 1998, and the related statements of activities and changes in net assets, and cash flows for the year then ended. These financial statements are the responsibility of the Council's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Council on Library and Information Resources as of June 30, 1998, and the results of its operations and its cash flows for the year then ended in conformity with generally accepted accounting principles.

Our audit was conducted for the purpose of forming an opinion on the basic financial statements taken as a whole. The accompanying schedule of functional expenses is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated in all material respects in relation to the basic financial statements taken as a whole.

Stone and Spring

Certified Public Accountants

Herndon, Virginia
September 1, 1998

Members American Institute of Certified Public Accountants

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COUNCIL ON LIBRARY AND INFORMATION RESOURCES

STATEMENT OF FINANCIAL POSITION

June 30, 1998
(With summarized financial information for June 30, 1997)

	Unrestricted	Temporarily Restricted	Total 1998	Total 1997
Assets				
Cash and cash equivalents	$ 167,401	$ -	$ 167,401	$ 356,133
Investments	1,308,172	2,470,524	3,778,696	4,370,390
Grants receivable	-	-	-	103,928
Accounts receivable - other	22,680	-	22,680	167,971
Furniture and equipment, net	41,029	-	41,029	13,746
Other assets	29,142	1,410	30,552	37,114
Total Assets	$ 1,568,424	$ 2,471,934	$ 4,040,358	$ 5,049,282
Liabilities and Net Assets				
Accounts payable and accrued expenses	$ 39,815	$ 141,130	$ 180,945	$ 370,438
Capital lease payable	10,400	-	10,400	-
Sublet deposits	6,290	-	6,290	-
Total Liabilities	$ 56,505	$ 141,130	$ 197,635	$ 370,438
Net Assets	1,511,919	2,330,804	3,842,723	4,678,844
Total Liabilities and Net Assets	$ 1,568,424	$ 2,471,934	$ 4,040,358	$ 5,049,282

The accompanying notes to financial statements are an integral part of this statement.

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COUNCIL ON LIBRARY AND INFORMATION RESOURCES

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

For the Year Ended June 30, 1998
(With summarized financial information for June 30, 1997)

	Unrestricted	Temporarily Restricted	Total 1998	Total 1997
Revenue				
Grants and contracts	$ 48,941	$ 187,500	$ 236,441	$ 1,000,552
Contributions	146,440	403,750	550,190	644,500
Publication sales	10,819	-	10,819	20,967
Investment income	95,875	135,911	231,786	250,590
	$ 302,075	$ 727,161	$ 1,029,236	$ 1,916,609
Net Assets released from Restrictions				
Satisfaction of program restrictions	$ 1,555,583	$ (1,555,583)	$ -	$ -
Total Revenue	$ 1,857,658	$ (828,422)	$ 1,029,236	$ 1,916,609
Expenses				
Program services:				
Preservation	$ 880,254	$ -	$ 880,254	$ 1,031,770
Leadership	259,295	-	259,295	281,628
Digital libraries	434,001	-	434,001	183,651
Economics of information	29,003	-	29,003	154,585
Total Program Services	$ 1,602,553	$ -	$ 1,602,553	$ 1,651,634
Administration	262,804	-	262,804	277,771
Total Expenses	$ 1,865,357	$ -	$ 1,865,357	$ 1,929,405
Change in Net Assets	(7,699)	(828,422)	(836,121)	(12,796)
Net Assets, Beginning of Year	1,519,618	3,159,226	4,678,844	4,691,640
Net Assets, End of Year	$ 1,511,919	$ 2,330,804	$ 3,842,723	$ 4,678,844

The accompanying notes to financial statements are an integral part of this statement.

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

STATEMENT OF CASH FLOWS

For the Year Ended June 30, 1998
(With summarized financial information for June 30, 1997)

	1998	1997
Operating Activities		
Change in net assets	$ (836,121)	$ (12,796)
Adjustments to reconcile change in net assets to net cash provided by (used) in operating activities		
Depreciation	28,432	24,703
(Increase) decrease in grants receivable	103,928	379,170
(Increase) decrease in other assets	6,562	34,241
(Increase) decrease in accounts receivable - other	145,291	(167,971)
Increase (decrease) in accounts payable and accrued expenses	(189,493)	(265,420)
Increase (decrease) in refund due to Xerox Corp.	-	(125,000)
Increase (decrease) in sublet deposits	6,290	-
Net Cash Provided (Used) By Operating Activities	$ (735,111)	$ (133,073)
Investing Activities		
Proceeds from sales of investments	$ 8,447,773	$ 13,806,696
Purchases of investments	(7,856,079)	(14,271,188)
Purchases of furniture and equipment	(55,715)	(5,696)
Net Cash Provided (Used) By Investing Activities	$ 535,979	$ (470,188)
Financing Activities		
Proceeds from capital lease	$ 13,150	$ -
Principle payments on capital lease	(2,750)	-
Net Cash Provided (used) By Financing Activities	$ 10,400	$ -
Net Change in Cash and Cash Equivalents	$ (188,732)	$ (603,261)
Cash and cash equivalents, beginning of year	356,133	959,394
Cash and cash equivalents, end of year	$ 167,401	$ 356,133

The accompanying notes to financial statements are an integral part of this statement.

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

NOTES TO FINANCIAL STATEMENTS

June 30, 1998

NOTE 1- Organization

The Council on Library and Information Resources (the "Council") is the result of the merger on July 1, 1997 of the Council on Library and Information Resources and the Commission on Preservation and Access. The Council is a not-for-profit organization incorporated under the laws of the District of Columbia in 1988 for the purpose of fostering, developing, and supporting systematic and purposeful collaboration in order to ensure the preservation of the published and documentary record in all formats and provide equitable access to that information.

The Council's operations are financed through contributions from colleges, universities and other organizations and through general support grants and restricted grants from private foundations and other sources. The Council conducts its work directly through committees and working groups as well as through contracts with other organizations and individuals.

NOTE 2- Summary of Significant Accounting Policies

Basis of accounting - The accompanying financial statements of the Council have been prepared on the accrual basis.

Grant revenue and recognition of grantor restrictions - The Council reports grants as temporarily restricted support if they are received with grantor stipulations that limit the use of the grants as to time or purpose. When either condition is satisfied, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities and changes in net assets as net assets released from restrictions. Support that is restricted by the grantor is reported as an increase in unrestricted net assets if the restriction expires in the reporting period in which the support is recognized.

Contracts / Grants payable - Contracts made by the Council are recorded as contracts payable and expensed at the time contracts are awarded. Current period expenses are adjusted for contract refunds or over appropriations when received.

Board designated net assets - From time to time, the Board of Trustees designates a portion of unrestricted net assets for various short-term projects.

Cash and cash equivalents - For purposes of the statement of cash flows, cash and cash equivalents consist primarily of deposits in a money market mutual fund and investments with original maturities of 90 days or less.

NOTES TO FINANCIAL STATEMENTS

June 30, 1998
(Continued)

NOTE 2- Summary of Significant Accounting Policies (continued)

Functional allocation of expenses - Costs of the various programs have been summarized on a functional basis in the accompanying financial statements. Certain indirect costs which include rent and other expenses are identified as support services costs and have been allocated directly to programs and administration. Salaries and travel costs have been allocated directly to programs and administration on a time-allocated basis.

Furniture and Equipment - Furniture and equipment are recorded at cost, less accumulated depreciation. Depreciation expense is computed using the straight-line method over the estimated useful lives of the respective assets. Expenditures for maintenance and repairs are charged against income as incurred; betterments which increase the value or materially extend the life of the related assets are capitalized.

Contributions - The Council records grant income as unrestricted, temporarily restricted, or permanently restricted support, depending upon the terms and conditions of the grant.

Fair value of financial instruments – Management estimates that the fair value of all financial instruments at June 30, 1998 does not differ materially from the aggregate carrying values reported in the accompanying statement of financial position due to the short term maturities of those instruments.

Use of estimates - The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements. Estimates also affect the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Summarized financial information - The financial statements include certain prior-year comparative information summarized in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with generally accepted accounting principles. Accordingly, such information should be read in conjunction with the Council's financial statements for the year ended June 30, 1997 from which the summarized information was derived.

Reclassification of prior year information - Certain amounts from the prior year have been reclassified to enhance comparability. 47

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

NOTES TO FINANCIAL STATEMENTS

June 30,1998
(Continued)

NOTE 2- Summary of Significant Accounting Policies (continued)

Investments – The Organization has adopted SFAS No. 124, "Accounting for Certain Investments Held by Not-for-Profit Organizations". Under SFAS No. 124, investments in marketable securities with readily determinable fair values and all investments in debt securities are reported at their fair values in the statement of financial position. Unrealized gains and losses are included in the change in net assets. Investment income and gains restricted by a donor are reported as increases in unrestricted net assets if the restrictions are met (either by passage of time or by use) in the reporting period in which the income and gains are recognized.

NOTE 3 - Income Taxes

The Council is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code and applicable regulations of the District of Columbia.

NOTE 4 - Furniture and Equipment

Furniture and equipment consist of the following:

	1998	1997
Furniture and equipment	$ 143,909	$ 89,872
Leasehold improvements	4,015	2,286
	147,924	92,158
Less: accumulated depreciation and amortization	(106,895)	(78,412)
	$ 41,029	$ 13,746

NOTE 5 - Net Assets released from Restrictions

Net assets were released from grantor restrictions by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by grantors.

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

NOTES TO FINANCIAL STATEMENTS

June 30,1998
(Continued)

NOTE 6 - Retirement Plan

Employees are eligible for participation in the Council's defined contribution retirement annuity program ("the Plan") administered through the TIAA/CREF insurance companies. Individual contracts issued under the Plan provide for full and immediate vesting of the Council's contributions. The Council contributes 15% of employees' salaries to the Plan each year. The Council's contributions were $105,628 and $82,417 in 1998 and 1997, respectively.

NOTE 7 - Concentrations of Credit Risk

Financial instruments which potentially subject the Council to concentrations of credit risk consist primarily of cash equivalents and grants receivable. At June 30, 1998 and 1997, approximately $579,921 and $100,776 respectively, in cash equivalents was being held by a third party in a money market mutual fund that invests solely in United States government securities. This amount is not insured by the Federal Deposit Insurance Corporation. In addition, cash in the bank at June 30, 1998 and 1997 exceeded FDIC insurance limits by approximately $67,101 and $165,304.

NOTE 8 - Commitments

The Council has entered into a noncancelable operating lease agreement for its office space which expires in August, 2003. The Council is subleasing a portion of its space until August, 2003. The Council is also leasing a phone system at a cost of $13,150 which has been classified as a capital lease.

Future minimum payments under all leases, net of sublease receipts, are as follows:

Year Ending June 30,	Capital Lease	Operating Lease
1999	$ 3,352	$ 123,387
2000	3,352	128,319
2001	3,352	133,453
2002	3,352	138,797
2003	-	144,348
Thereafter	-	24,166
Total	$ 13,408	$ 692,470
Amount representing interest	3,008	
Present value of Net Minimum Lease payments	$ 10,400	

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

NOTES TO FINANCIAL STATEMENTS

June 30,1998
(Concluded)

NOTE 9- Merger

The Council on Library and Information Resources was formed on July 1, 1997 as the result of the merging of two affiliated organizations. The Commission on Preservation and Access and the Council on Library and Information Resources had been affiliated since February 1995. The decision was made to merge on the basis that both organizations missions and activities had become complementary, and advances in technologies continue to create challenges and opportunities for Libraries and other depositories of information. Accordingly, summarized information for 1997 includes the balances from the audited financial statements of both the Commission on Preservation and Access and the Council on Library and Information Resources.

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

SCHEDULE OF FUNCTIONAL EXPENSES

For the Year Ended June 30, 1998
(With summarized financial information for June 30, 1997)

COUNCIL ON LIBRARY AND INFORMATION RESOURCES

SCHEDULE OF FUNCTIONAL EXPENSES

For the Year Ended June 30, 1998
(With summarized financial information for June 30, 1997)

	Preservation	Leadership	Digital Libraries	Economics of Information	Total Program Services	Admin.	Total 1998	Total 1997
Grants	-	8,755	-	19,571	28,326	-	28,326	$ 251,548
Refunds	-	(1,874)	-	-	(1,874)	-	(1,874)	(6,499)
Contracts	6,304	-	160,908	-	167,212	-	167,212	60,656
Meeting & Travel	100,310	9,591	77,285	3,287	190,473	19,782	210,255	230,637
Staff	609,520	146,969	112,557	-	869,046	34,569	903,615	811,640
Consultants	30,986	82,194	35,079	3,500	151,759	8,036	159,795	232,335
Board Expense	-	-	-	-	-	17,725	17,725	31,419
Program Support	133,134	13,660	48,172	2,645	197,611	182,692	380,303	317,669
	$ 880,254	$ 259,295	$ 434,001	$ 29,003	$ 1,602,553	$ 262,804	$ 1,865,357	$ 1,929,405

The accompanying notes to financial statements are an integral part of this statement.

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COUNCIL ON LIBRARY AND INFORMATION RESOURCES

1755 MASSACHUSETTS AVENUE, N.W., SUITE 500, WASHINGTON, D.C. 20036-2124
Telephone: 202.939.4750 • Fax: 202.939.4765 • E-mail: info@clir.org • Web: http://www.clir.org

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